BENEFICIARY

BOOT CAMP

TRAINING FOR A RESPONSIBLE TRANSITION

www.**beneficiarybootcamp**.com

Enlisting a group of proactive and engaged ‘next gen’ beneficiaries who understand that the benefits of a trust come with immense challenges and responsibilities.

- ➡ Feeling disconnected from your financial assets?
- ➡ Grasping for a way to do something significant with your resources?
- ➡ Wishing you knew how your parents’ estate plan impacts you?
- ➡ Uncomfortable answering the question “So, what do you do?”
- ➡ Overwhelmed when you think about budgeting and how to track your spending?
- ➡ Trying to reconcile the wishes of your family’s wealth creator with your own dreams and aspirations?

To prepare you to positively embrace the role of beneficiary, we bring you a course that provides the skills to confidently take control of your life and finances:

Beneficiary Boot Camp

Beneficiary Boot Camp is designed specifically for you,

a motivated and focused trust beneficiary seeking liberation from the stigmas and perceived restraints of your trust. You'll learn to be a proactive and engaged custodian of your legacy, constantly excited for the amazing opportunities that it provides.

This course will help you build confidence in your management skills, while developing an inspired vision for your life and talents.

Join Kristin Keffeler (Kinetic Enterprise) and Alison Moss (Empowered Beneficiaries™) for a two-and-a-half day workshop that will transform your understanding of:

- ➡ The Three keys to being an Empowered Beneficiary™
- ➡ Healthy financial habits
- ➡ Productive expectations of Trustees
- ➡ Benchmarks for assessing trust investments
- ➡ Taking control of your decision making

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Kristin Keffeler is the founder of Kinetic Enterprise, supporting the next generation in affluent families. As a 'next gen' peer, she helps beneficiaries develop crucial business and life skills.

Alison Moss is a principal at wealth advisory firm Paul Comstock Partners® and the founder of Empowering Benficiaries™, where she is an advisor and advocate for the nextgeneration in family wealth.

A G E N D A

Day 1: 5pm – 9pm

➡ **Pre-workshop Evening Gathering**

- Group Dinner
- Welcome / Overview of workshop
- Connecting with peers

Day 2: 9am – 4:30pm

➡ **Defining the role of a Beneficiary**
The opportunities and the unintended consequences

➡ **Estate Planning Drivers**
How Uncle Sam and potential creditors motivate wealthy families to utilize restrictive vehicles such as trusts when transferring wealth

➡ **The Role of Trusts in Estate Planning**

- Why your trust money isn't really "yours"
- How do you maximize your trust's potential?
- Who are the key players in your trust?
- How you build a productive relationship with your trustee

➡ **What are other families doing?**
A look into the "norms" of wealth transfer, the common pitfalls, and success stories as we review sample scenarios and collaborate together with those at the workshop.

➡ **Uncover your own 'money story'**
Understanding the patterns and dynamics of your family system

A G E N D A

Day 2: 7pm

➡ **Dinner Together**

Time to integrate what we're learning, uncover any remaining questions, and organize new information into a plan of action.

Day 3: 9am – 4:30pm

➡ **Trusts Tell-All**

Every question you ever had but were afraid to ask.

- Tips on how to answer the question, "So, what do you do?"
- Resources/tools for budgeting and learning how to track your spending
- Any/all of your questions··· you ask 'em, we'll answer 'em

➡ **The Keys to Becoming an Engaged and Empowered Beneficiary**

➡ **Get Engaged with Your Money**

- Building your vision of success and fulfillment... and action-planning how to work with your trustee and your family to get there
- Make decisions that preserve your portfolio and avoiding common mistakes that eat up all your 'chickens'

➡ **Resources, Evaluations, and Next Steps**